**Faculty Success Reviews, Promotion and Tenure Essential Skills Checklist**

As you prepare to launch Faculty Success Reviews, Promotion and Tenure to your institution, take the time to consider what information your faculty and staff will need to know to successfully use this tool.

This checklist of essential skills will give you a solid foundation to prepare your faculty and staff to work with your new tool. Review this list and focus your training on the primary features your institution will need.

* Logging in

When you launch the Reviews, Promotion and Tenure (RPT) process, tasks are created and await the attention of the faculty who will submit their materials. The faculty member can access these tasks two ways:

1. **Through the email that was generated when the process launched.**

 

1. **By logging into Faculty Success directly.** When a process launches, the appropriate users will be given access to the Workflow Tasks utility, where they can review the Inbox for any available tasks.
* Submitting a step (when a submission is complete and ready to submit)

	+ Click **Actions**, then click **Submit**.
	**Note:** Your system administrator may have configured this area differently. ***If this is the***

***case, system administrators should adjust these instructions to reflect the actions available to faculty.***

* + If a submission is partially completed, click **Save Draft**.
* Recalling a step

After you advance a submission to the next step, you can **recall** the submission from that step to correct factual or typographical errors, add a critical piece of information that was missed, or further review a submission that was prematurely advanced.

To recall a step:

* + Click the arrow under **Actions**.
	+ Click **Recall**.
	**Note:** Once the next step has begun, the recall option is no longer available.
* Accessing submission and future step contents from the History table (if available)

After a subject has advanced the process to the next step, they will see the task move from the Inbox to the History section in Workflow. There, they can see where in the process the submission stands as it advances through each future step, and, depending on the form visibility settings, review the content of the submission and the fields completed by reviewers.

The historical record will remain available to the subject for future reference.

To access history:

* Log into **Faculty Success**.
	+ Click **Workflow**.
	+ Locate the **History** section.
* Accessing Help Center resources (who to contact, where to find documentation, etc.)

From your Faculty Success account, click **?** in the top right corner to contact Technical Support or your campus administrator. Or your colleague does not have a Faculty Success account, but would like to explore the Help Center, they can click <https://support.watermarkinsights.com/hc/en-us> and select Faculty Success.